

THE NAMIBIAN FISHERIES EXPERIENCE

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A unique environment

As a consequence of the upwelling of the nutrient rich Benguela current the fishing grounds off the coast of Namibia were once the most productive in the world. Fishing activities off the coast of Namibia have always been organized into two quite separate in-shore and off-shore industries. In shore pilchard and anchovy dominate, whilst off shore hake and Horse Mackerel dominate. A highly integrated fish processing industry based on the in-shore pilchard has been built up at Walvis Bay, whilst off-shore long distance foreign fleets with few links to Walvis Bay have dominated the fishery.

Rock Lobster off the southern coast near Luderitz was however the first fish resource to be commercially developed in the 1920's. It was not until the late 1940's with improved refrigerated transport that the lobster canning industry really took off. Sadly, as was to be repeated with other fish resources in Namibia, intensification of the exploitation of the lobster stock soon gave way to over-exploitation and within 25 years stocks had been severely depleted and a mere 20% of peak levels of catches were the norm.

This experience of over exploitation in all major fish stocks has an important bearing on the current attitude of the Namibian Government towards fisheries management.

The in-shore fishery

In the early years of the development of the pelagic fish industry in Namibia (1949-59), conservation minded local fisheries officials carefully regulated the exploitation of the available stocks. However, corporate pressure from the South African industry coupled with South Africa's illegal occupation of Namibia led to the abandonment of these careful management policies from the beginning of the 1960's. The 1960's saw a huge expansion of the fish processing capacity installed and pilchard quota's granted. From 1965 the on-shore processing capacity was supplemented by the deployment of South African factory ships, outside of the 22 Km jurisdiction of the local Namibian fisheries administration. This occurred despite serious warnings of impending stock depletion by the local fisheries administration. The intensified fishing effort proved disastrous. In 1968 a staggering 1387000 tones of pilchard were swept from the oceans off the coast of Namibia, slaugh-

tering in one year between 30% and 50% of the pilchard biomass. This over exploitation of the pilchard stock was compounded by the assumption of direct control of the fisheries administration by the South African Government. This was to ensure that the plunder of the pilchard stock continued until the decline in stock levels was terminal. The decline of the pilchard stock, led to an intensification of the anchovy fishing effort. This rapidly resulted in the decline of the Anchovy biomass from 750000 tones in the 1960's to between 40000 and 150000 tones in the early 1980's (after which some recovery apparently took place).

The decline of the Pilchard fishery had a devastating impact on the local economy. In 1975 with some 10.8 million cartons of canned fish being produced, processed fish accounted for 10% of Namibia's GDP and 15% of exports. It was furthermore the second largest industrial employer after mineral processing, with some 850 people employed on the boats, some 7500 employed in the fish processing industry itself and a further, 750 employed in associated activities, a total of over 9000 employees. By the time of Namibian independence only some 5700 people were obtaining employment from fishing, fish processing and related activities. Namibianization had resulted in an expansion of employment arising from fishing activities per se, with some 1200 jobs now being undertaken by Namibians. On the processing side however a dramatic reduction of employment occurred (despite a remarkable improvement in the utilization of available fish landed, with 80% of pilchards now finding their way to the cannery), with only some 3250 workers being employed in canning and reduction, of whom fully 2450 or 75% were seasonal labourers, who had employment for only some 2 to 3 months per year.

The crisis in the in-shore fishing industry arising from over-fishing has thus made itself sorely felt on the under-developed areas of Ovamboland which remain dependent on labour remittances from migrant labourers who can now only obtain a small proportion of the employment they previously enjoyed.

The principle cause of this decline in the in-shore fishery was seen to be a lack of national control over the fishing effort. This perception has ensured that in the context of a newly and hard won independence, the Namibian Government fiercely guards its sovereignty in setting the terms and conditions under which fishing activities can take place in its EEZ.

The sensitivity of the Namibian Government on the sovereignty question in the fisheries sector has not been fully appreciated by the Commission of the European Community in its handling of negotiations for a fisheries agreement. This sensitivity is heightened by the shortage of experienced and skilled fisheries administrators in Namibia. For while the Namibian Government may have clear ideas of what it would like to see happening in the fisheries sector, its capacity to bring this situation about is extremely limited at the present time.

Here again the Commission of the European Community has not always displayed sensitivity in its appreciation of the Namibian Government's limitations.

Finally, the Commission has demonstrated a singular insensitivity towards the history of exploitation of Namibia's off-shore fish stocks, where the Spanish fishing fleet (alongside East European fishing fleets) bears a heavy responsibility for the depletion of the all important Hake fishery.

The hake fishery

In value terms deep-sea trawling has always been far more significant than the inshore pelagic fish industry. This was the case even at the peak of the inshore fisheries productivity, when the offshore white fish, when processed accounted for twice the value of the inshore pelagic industry. However, the offshore industry, exploited as it was by long distance foreign fleets, brought little benefit to Namibia

Yet despite the value of the fish caught in Namibia's EEZ to date, the deep sea fishing industry off the coast of Namibia has brought little or no economic benefits to Namibia, for the deep-sea fishery has been almost exclusively exploited by long-distance foreign fleets. Early Namibian efforts to develop a white fish trawler fleet in the 1920's were frustrated by the distance from major markets. From 1984 foreign interest in Namibia's off-shore fishing grounds grew rapidly, with the advent of large long distance freezer trawlers. In 1964 a mere 47 600 tones of Hake were caught by foreign vessels in Namibian waters by 1968 this had risen to a staggering 629 100 tones.

The importance of the fishing grounds off the Namibian coast led in 1969 to the establishment of the International Commission for Southeast Atlantic Fisheries (ICSEAF). This FAO initiative brought together those fishing nations who were involved in exploiting the fish resources off the coast of Namibia with a view to: providing a forum for the pooling of scientific research; agreeing on regulatory measures and organizing backup administrative monitoring and information services. Whilst ICSEAF was modeled on similar fishery conventions for the North Atlantic it was from the start no ordinary fishery convention. Its focus rather than being regional was almost exclusively Namibian and yet, since South Africa's illegal occupation of Namibia

was not recognized internationally, the interests of the coastal state rather than dominating the activities of the Convention were only marginally and indirectly represented through South Africa, which was but one of ICSEAF's 17 members.

Despite the regulatory measures it sought to introduce which at various times included: catch quota's, minimum mesh size regulations, limits on the hake by catch, closed zones and a system of inspection, ICSEAF was to oversee a massive plunder of Namibia's Hake fishery and its serious depletion. All in all in the 20 years between the establishment of ICSEAF and its dissolution in 1990 over 8 585 000 tones of Hake were swept out of Namibia's waters, leaving the Hake biomass in Namibia's waters at only 20% of its 1969 level. The value of this fish was put at a staggering Rand 1411500000 (over Rand 14 Billion). Out of this bounty Namibia received a meagre \$180 000 from a Trust Fund created by ICSEAF in 1981 for an independent Namibia. Only one payment was ever made into the Trust Fund by the fishing nations who were members of ICSEAF and that payment came from South Africa in 1981, the year the Trust was first established.

Over the lifetime of ICSEAF the direct financial benefit to Namibia from the foreign activity in its deep-sea fishery amounted a mere 0.004% of the value of the fish taken. This appallingly low level of financial benefit to Namibia was over-shadowed however by the damage done to the hake stocks. At independence the Hake biomass was only 20% of its 1969 peak.

The over exploitation of Namibia's has bequeathed to the Government of an independent Namibia the enormous task of ensuring, for a ten year period, such stringent monitoring and control of its EEZ, as to enable a rebuilding of its hake fishery to a level which will be able to sustain a yield of a mere 4% of the peak level of yield taken from Namibia's waters under ICSEAF's regulation and some 81% of the average yield under ICSEAF's regulation. With this Herculean task in mind in 1991 the Namibian Government set the TAC for hake at 60000 tones, 7% of the peak catch of 1972.

The Spanish fishing industry played a particularly important role in this depletion of the Hake stocks. From the outset Spanish vessels concentrated on the Hake stock, and even when signs of depletion emerged and the East European fleets began to switch to Horse Mackerel, the Spanish fleet continued to concentrate on the Hake fishery.

So it was that as the 1980's drew on the Spanish fishing fleet came to play the dominant role in the continued over-exploitation of the Namibian hake fishery. Between 1981 and 1988 Spanish trawlers reported catching over 1105706 tones of hake in Namibian waters, valued at some Rand 4.25 billion. By the time Namibia began the final leg of its road to independence

some 173 Spanish vessels were dependent on access to the Namibian Hake fishery, to sustain the livelihood of 6200 seamen and on-shore employment for 40000 fish processing workers.

This was the background against which with the independence of Namibia the European Community sought to negotiate a fisheries agreement with Namibia.

Fisheries agreements

The Namibian Government has sought to learn the lessons of the fishing experience of the coast of Namibia. The first lesson which has been learnt is that fish stocks require careful management.

Catches of Hake off the Namibian coast rose progressively from 1964 with only minor hiccups until an all time high of over 820 000 tones was reached in 1972. Declining catch levels then began to provide clear indications that the Hake stock was being over fished. A couple of years of good recruitment however, gave the industry a false optimism that the decline had only been temporary and as the fishing effort intensified catch levels once again began to rise, until a major decline in catch levels began to set in 1977. By the 1978-79 period Catch per unit of effort had fallen 60% compared to the 1968-69 period. This led most of those nations who had been fishing primarily for Hake to switch over to Horse Mackerel, with the notable exception of the Spanish, fleet. 1980 catches were the lowest since 1964. Good recruitment in subsequent years however was not capitalised on with a view to rebuilding stocks, rather it was seen as giving a green light to a renewed intensification of hake fishing activities. As a result although catch levels increased in the mid 1980's this was unsustainable and by the end of the 1980's reported catch levels were once more on a declining trend, with the total biomass much reduced and the fishing effort being applied being of such an intensity as to maintain the hake stock in its severely depleted state.

Whilst over this time ICSEAF introduced a range of measures (increased mesh size, establishment of quota's) designed to restrict fishing activities in the interests of conservation, these measures proved to be too little too late.

The often tentative nature of stock recovery has not been lost on the Namibian authorities, as a result of its experience both in the pelagic and demersal fishery. As a result the Namibian Government is now determined to set the annual TAC at a conservative level in order to ensure that any nascent process of stock recovery is not endangered. This policy has aroused considerable criticism in Europe arising from the strong commercial interest of the Spanish fleet in the Namibian hake fishery. Yet to date the Namibian Government has firmly resisted all pressures for an upward revision of the total allowable catch for Hake.

Flowing from the ICSEAF experience, it became ap-

parent at independence that it the Namibian authorities were to effectively pursue the management goal of stock recovery then it was essential that a low total allowable catch be set to allow good recruitment years to find their way through to adulthood and so expand the overall hake biomass. It was also apparent that not only will a low TAC need to be set, but that stringent enforcement of monitoring and control measures will be required to ensure that the TAC is not exceeded for the hake fishery (both by directed fishing and as a result of by-catches in fishing effort directed at other species).

It was also apparent from the stock history that ICSEAF scientists' assessments exceeded the actual potentials of the stocks and that either their data or their model for assessing stocks and permissible catches were wrong. Independent assessments by German scientists in 1986 and 1989 indicated that the fishing levels rather than being moderate were in fact set at almost double the level which should have been the maximum fishing level. This experience reinforced the believe in the importance of an accurate scientific basis for stock management derived from the experience of the in-shore fishery. In the case of both the in-shore pilchard fishery and the offshore hake fishery the stock history provided a clear demonstration of the dangers inherent in any policy which is driven by the commercial interests of established operators. In both cases scientific warnings of impending collapse had been given, yet singularly ignored, for the management regime was excessively influenced by the interests of the commercial operators.

This lesson has not been lost on the Namibian Government. which is seeking to keep a tight regulatory hand on the development of both the pelagic and demersal fishing industry in Namibia with a view to avoiding over-investment in capacity (both fishing and processing), which has generated such damaging pressures on fish stocks both in Namibian waters in the past and EC waters today.

For the Namibian authorities what the ICSEAF experience demonstrated most was the need for a strong and independent Namibian management authority, determined to enforce its fisheries regulations and with the capacity to do so. Indeed it is against this background that the Namibian authorities are carefully weighing up all external offers of assistance in the fisheries sector and critically examining all proposals for fisheries agreements.

Implications for negotiations

These lessons have an important bearing on the Namibian Government's approach to the negotiation of a fisheries agreement with the EC. The Namibian Government is committed to fostering a process of stock recovery. With this in mind a conservative estimation of the Total Allowable Catch is used, particu-

larly since the Namibian authorities, at the present time, only have a limited capacity to monitor and control the actual fishing activities which take place. In this manner it is hoped that years of good recruitment can be capitalised on in order to foster a rapid process of stock recovery.

Since the Namibia Government is committed to the development of its own indigenous off-shore fishing industry and fleet, so that more of the benefits of the fishing industry can accrue to the Namibian people, one immediate and direct implication of this approach is that, in the coming years, there will be only limited fishing opportunities made available to overseas fleets. This is something which the Commission of the European Community has yet to fully take on board. The Commission rather than focusing on securing the fullest share of the fishing opportunities likely to be made available to foreign fleets, has focused on criticizing the scientific basis on which the TAC is set. This is wholly counter-productive, given the sensitivity of the sovereignty question.

The Namibian Government is keenly aware of the need for effective monitoring and control to back up fisheries regulations, for without effective enforcement the majority of fisheries regulations are ignored. During the first round of fisheries negotiations with the Commission, the Namibian authorities made clear their concern over effective monitoring and control by putting forward a number of specific provisions for inclusion in any fisheries agreement and by seeking to move away from Gross Registered Tonnage as the sole basis for calculating access to a formula based on the Effective

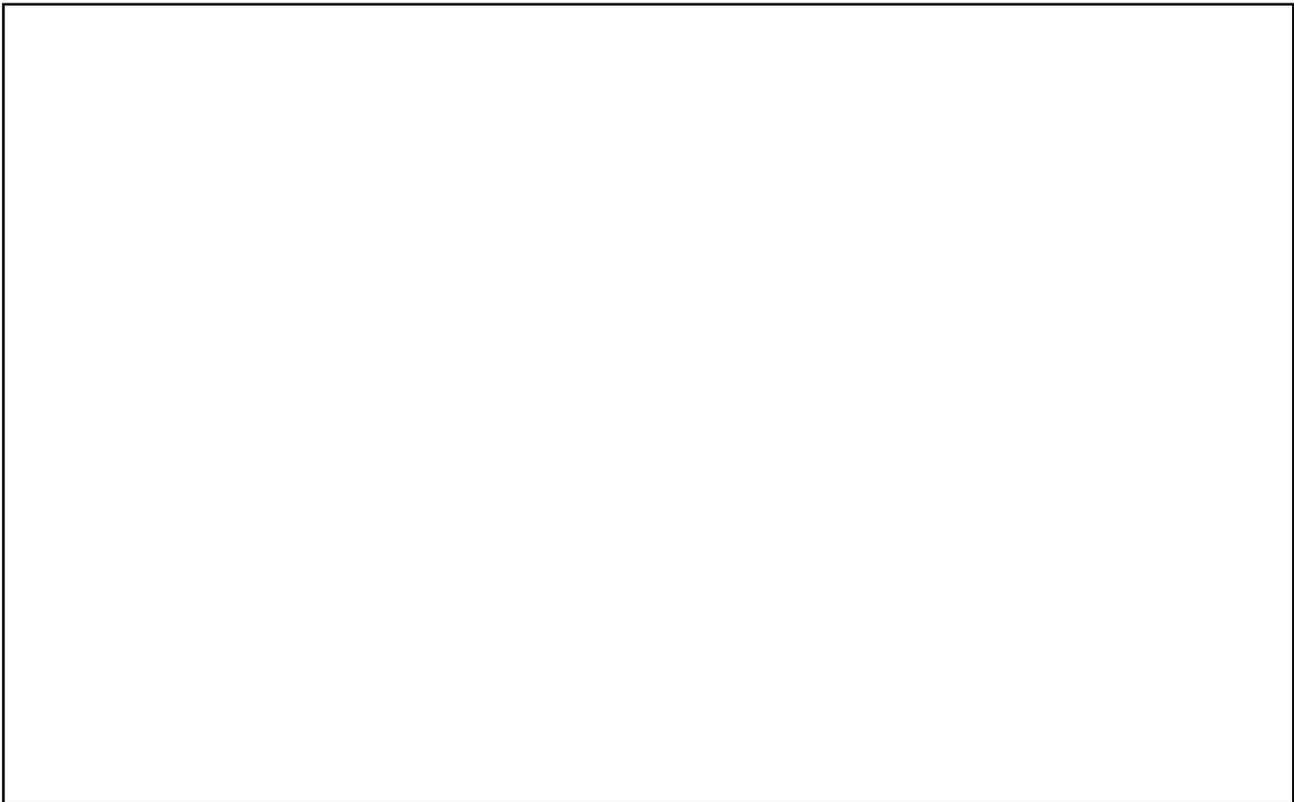
Fishing Effort of the boats allowed access.

From the Namibian perspective, given the state of depletion of the stocks and the strong commitment to the development of an indigenous off shore fleet, a traditional fisheries agreement with the EC will bring little financial benefit to Namibia. A fisheries agreement at the present time is primarily of interest to the Namibian Government to the extent that it brings the weight of the contracting party behind the efforts to establish effective monitoring and control. For without effective monitoring and control which is capable of ensuring stock recovery, there can be no future for the Namibian fishing industry.

For the Namibian authorities therefore, questions of monitoring and control and the role of fisheries agreements in supporting effective monitoring and control are a central concern. Given the stock depletion in the waters of other ACP states, the Namibian Government's efforts to secure a fisheries agreement with the EC capable of promoting a process of stock recovery, is of considerable interest.

Namibia and the European Community

The EC fishing industry is an industry in crisis. As a result of the shortcomings of the management regime, a wide variety of fish stocks are seriously depleted. As a result securing access to third country waters has become of growing importance.



In 1987 while some 4.5 million tones of fish were caught by Community vessels in Community waters, some 3.5 million tones were imported and a further 1.7 million tones caught by Community vessels in third country or international waters. Thus in 1987, some 54% of all fish (for human consumption, meal, oil and other uses) originated from non-EC waters. Considering only salt water fish for human consumption, landings by EC vessels accounted for 56% of supplies to the 20 market, with approximately some 25% of these originating in non EC waters. Thus a meagre 42% of fish for human consumption on the EC are now originating in the EC's own waters.

Thus no matter which way one tries to cut the cake "the Community fishery products market is highly dependent on imports from non-Community countries".

Extrapolating from the fact that 25% of fish for human consumption landed by EC boats originates in third country waters (allowing for the fact that 95% of all marine resources lie within a 200 mile EEZ) and taking into account the greater capital intensity of long distance trawlers one can see that the jobs of over some 30 000 fishermen and perhaps a further 200 000 workers in related industries are directly dependent on continued access by 20 vessels to third country waters.

One can thus see the economic importance to the European Community of maintaining access to third country waters and why fishing access agreements are now a "basic element of the common fisheries policy." Indeed, the development of fisheries agreements is deemed to have:

"made it possible to maintain, restore and develop the vital interests of the Community and the Member States"

Yet there is a growing perception in the Commission that the old basis for fisheries agreements is now inadequate. Indeed, as developing countries acquire their own fishing capacity so the Community must look towards means of safeguarding its position through "new association formula's" which provide for more lasting cooperation.

From a Commission perspective these new association formula's would largely be limited to establishing a firmer basis for joint ventures in fishing operations. These joint venture arrangement would not even be extended to processing and marketing aspects of the fishing industry.

The question of what from an ACP perspective these "new association formula's" should encompass has yet to be elaborated. Certainly the current debate offers certain opportunities which ACP states should seek to develop to ensure the "second generation fisheries agreements" contribute more fully to the broader economic development of the economies of ACP states.

From a Namibian perspective what "second generation fisheries agreements" should entail is clear. It should encompass effective measures to support the monitoring and control of fishing activities in order to ensure a process of stock recovery. It should include greater provision for shore based inspection and it should base access on effective fishing effort, which should be in line with the catch allocated to EC vessels. The Namibian position raises the general question:

Will the EC extend the conclusions arising from the evaluation of its own internal fisheries management regime to the type of fisheries agreements it concludes in the future with ACP states? Will the EC be willing to sign fisheries agreements which include effective provisions on monitoring and control, to ensure stock recovery, if this runs against the short term commercial interests of EC fishing operators? Will the EC be willing to conclude a fisheries agreement which fosters the progressive development of an indigenous Namibian off-shore fishing industry, with associated on-shore processing industry and the processing, packaging and marketing skills to expand exports to the sophisticated EC market?

At the present time there can be little doubt that the importance of access to third country waters in assisting the EC in coping with the immediate problems in the EC's own fishing industry, is leading the Commission to take a short term view of the function of fisheries agreements. The Directorate General for Fisheries (DG XIV) principle concern in fisheries negotiations remains maximizing short term access to fishing opportunities for the EC fleet. If this is going to be altered a wider debate on the role of fisheries agreements in promoting both specifically, the development of an indigenous fishing industry and more generally, economic development in ACP States needs to be launched.

The recent establishment of an ACP-EEC Joint Assembly Working Group on the "Role of Fisheries in Development" provides an ideal forum for the launching of such a wider debate.